

# Organic market development in Latin America

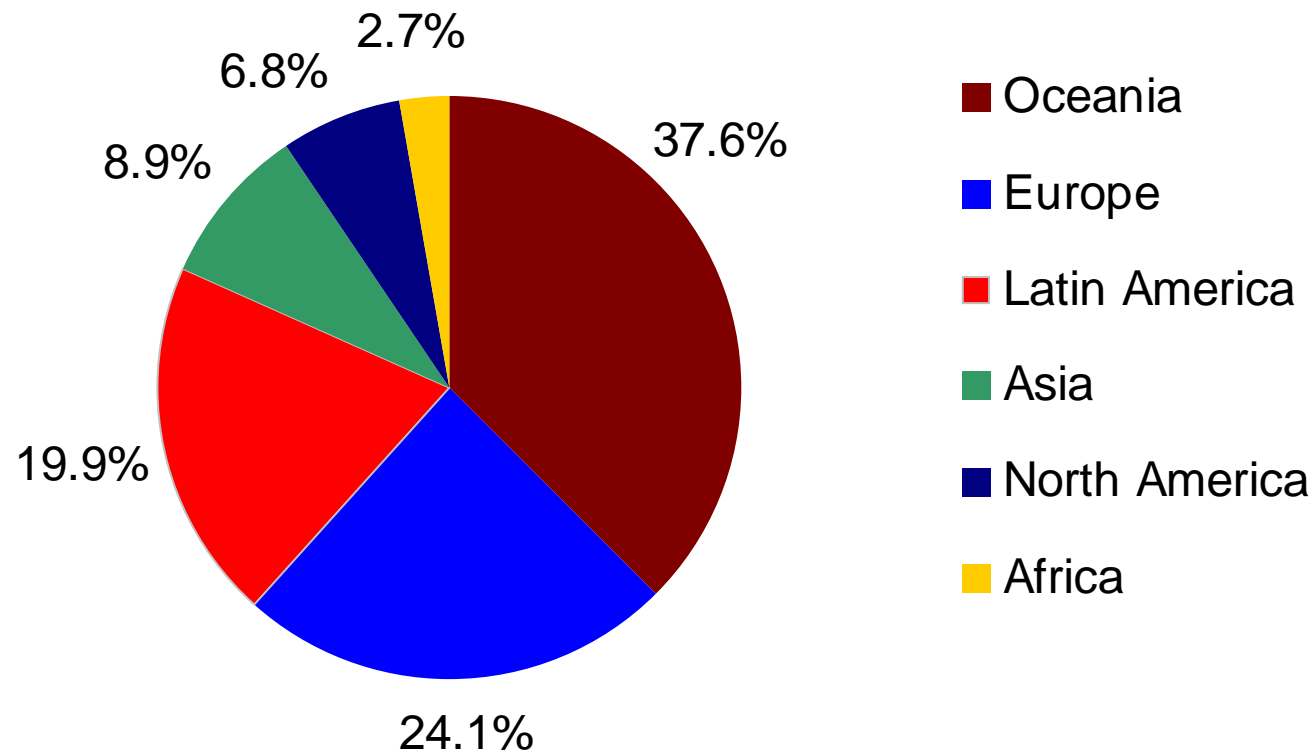
➤ **Salvador Garibay**

# Content

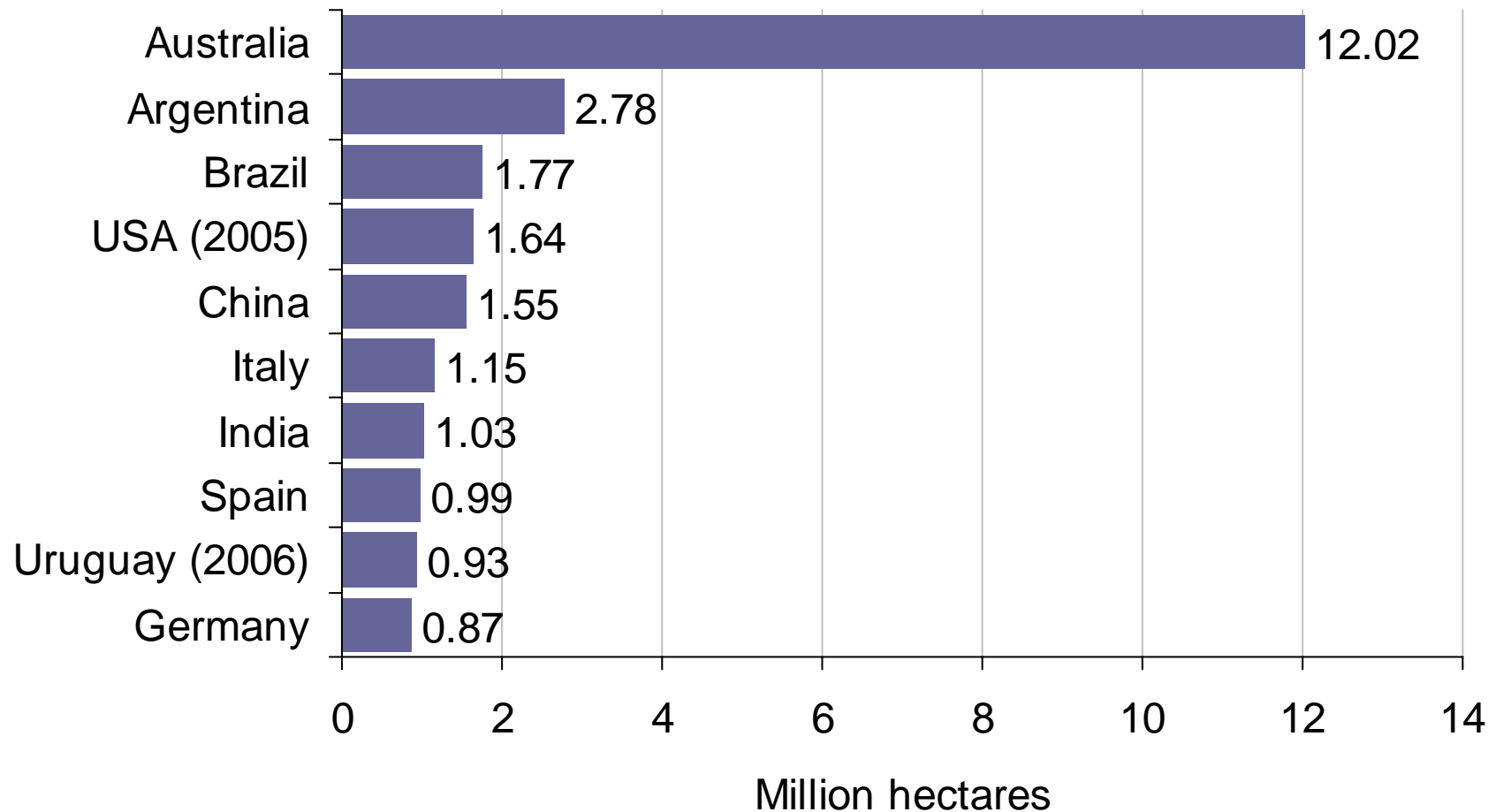
- Latin America and the organic world
- Latin America organic production
- The organic market trends in Latin America
- Conclusions



# Organically managed land by geographical region 2008

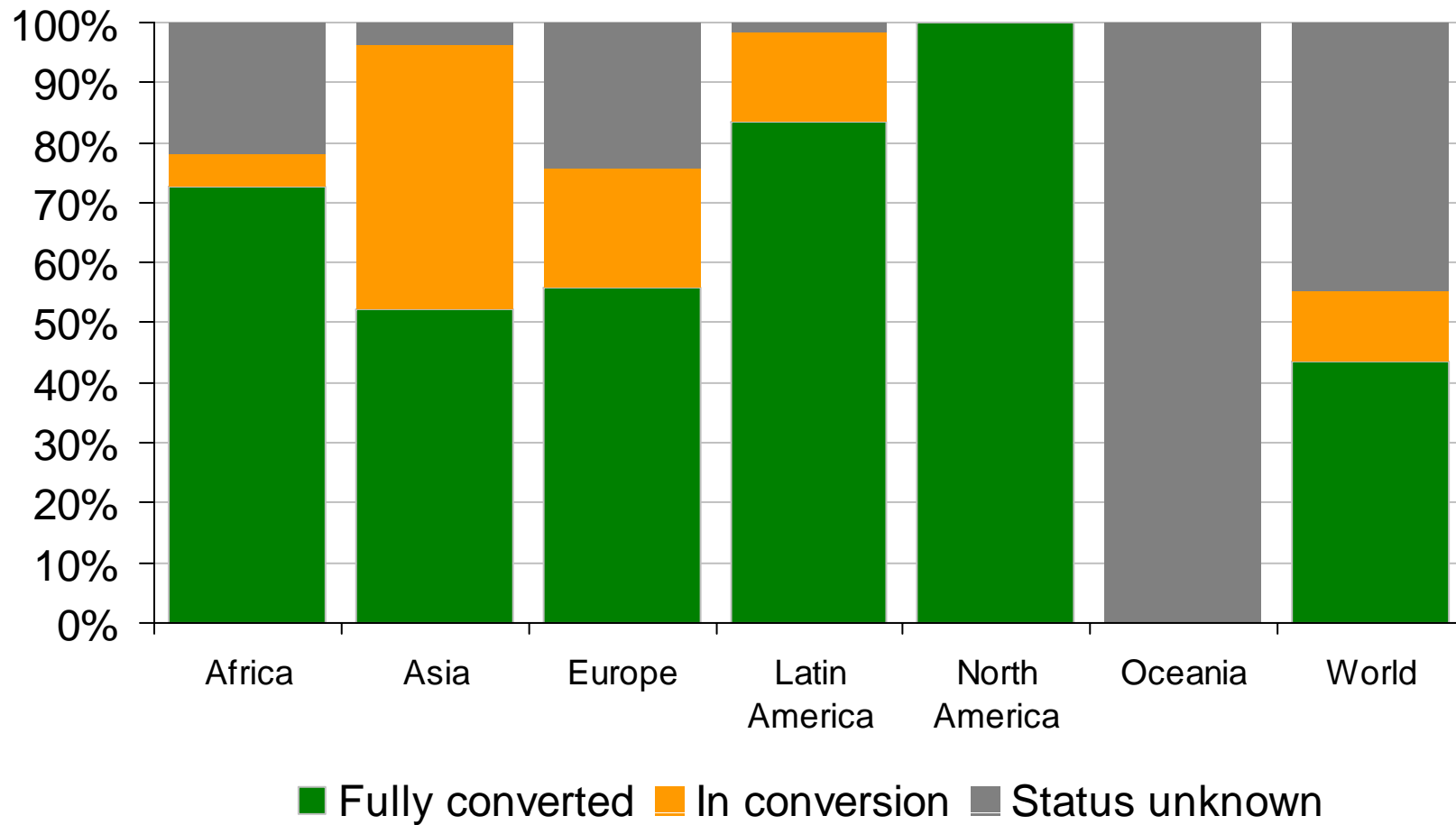


# The ten countries with most organically managed land 2007

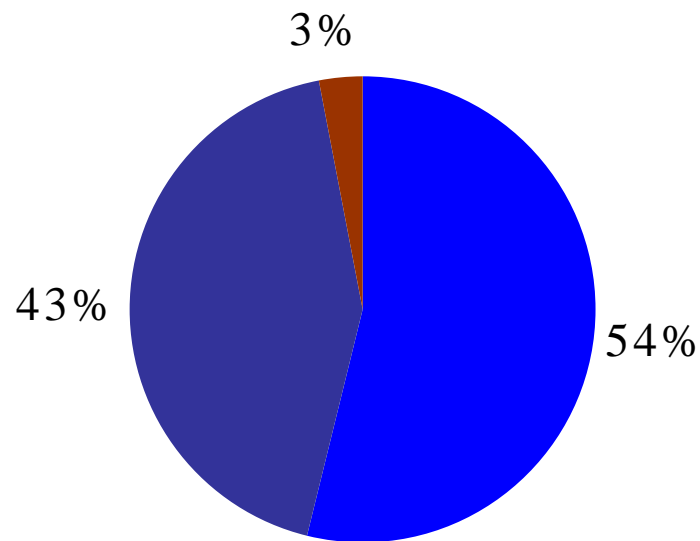


Argentina, US and Uruguay: Only fully converted areas

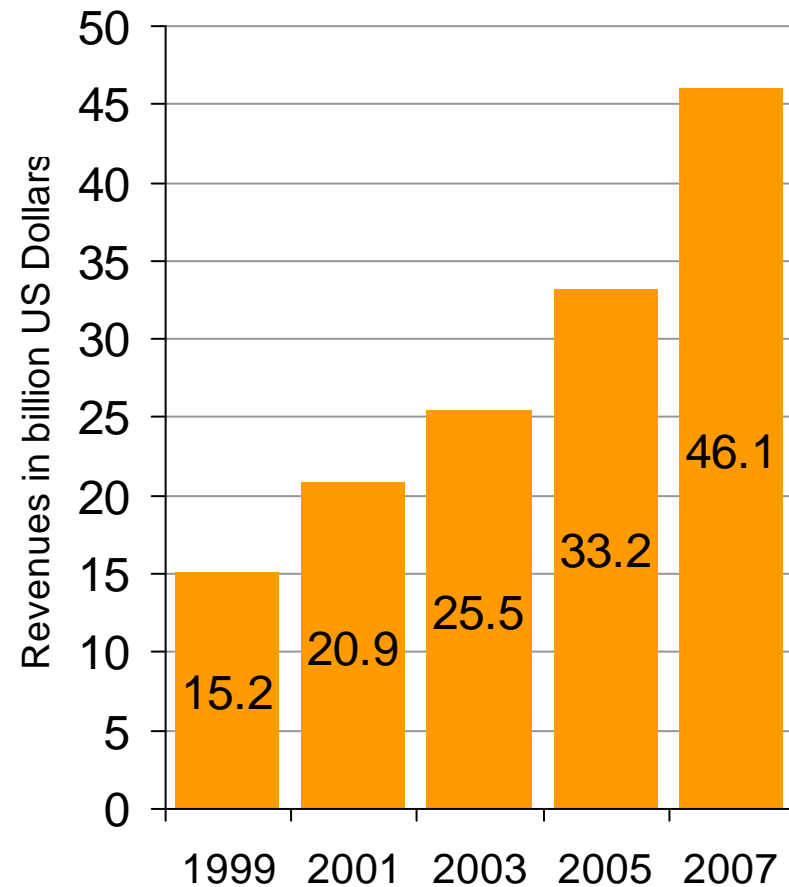
# Conversion status of organically managed land 2007



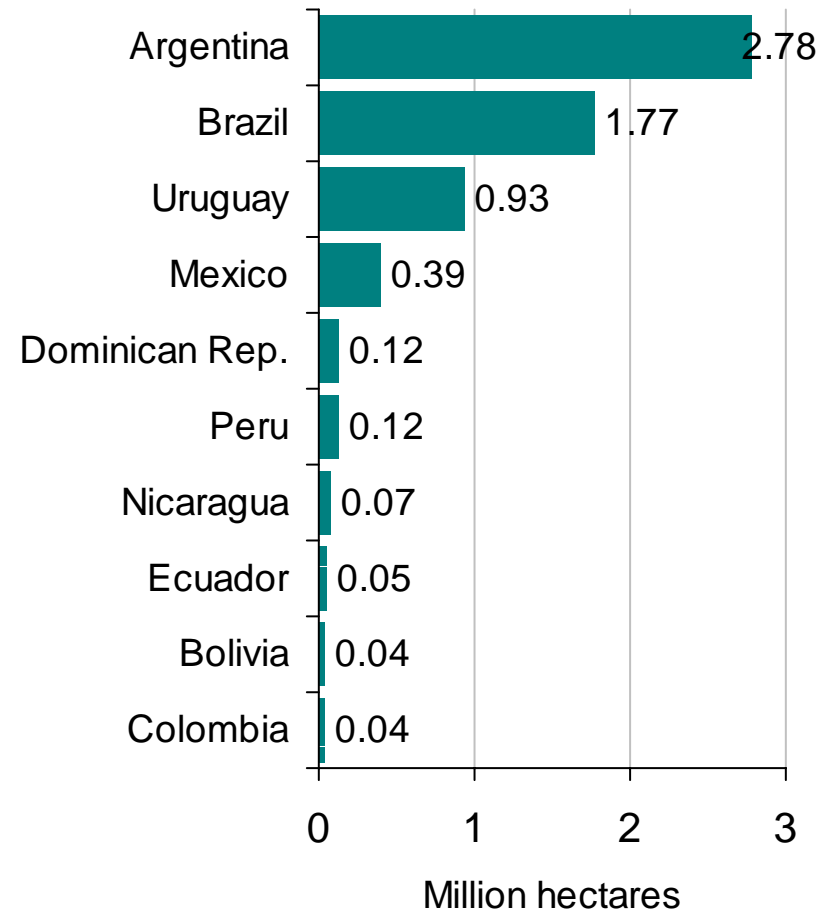
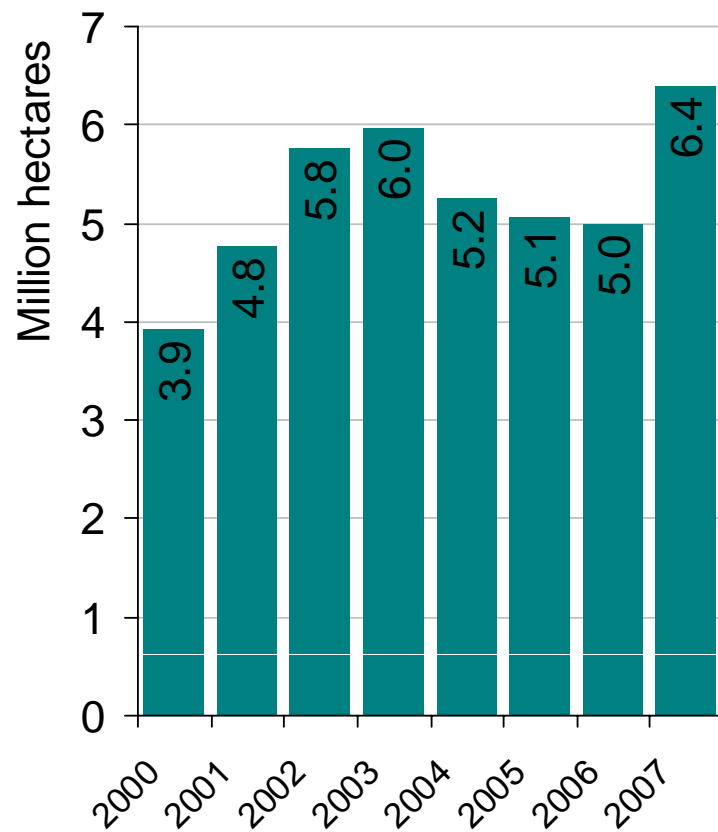
# Distribution of global revenues by region 2007 and The global market for organic food and drink: Market growth 1999-2007



- Europe
- North America
- Others

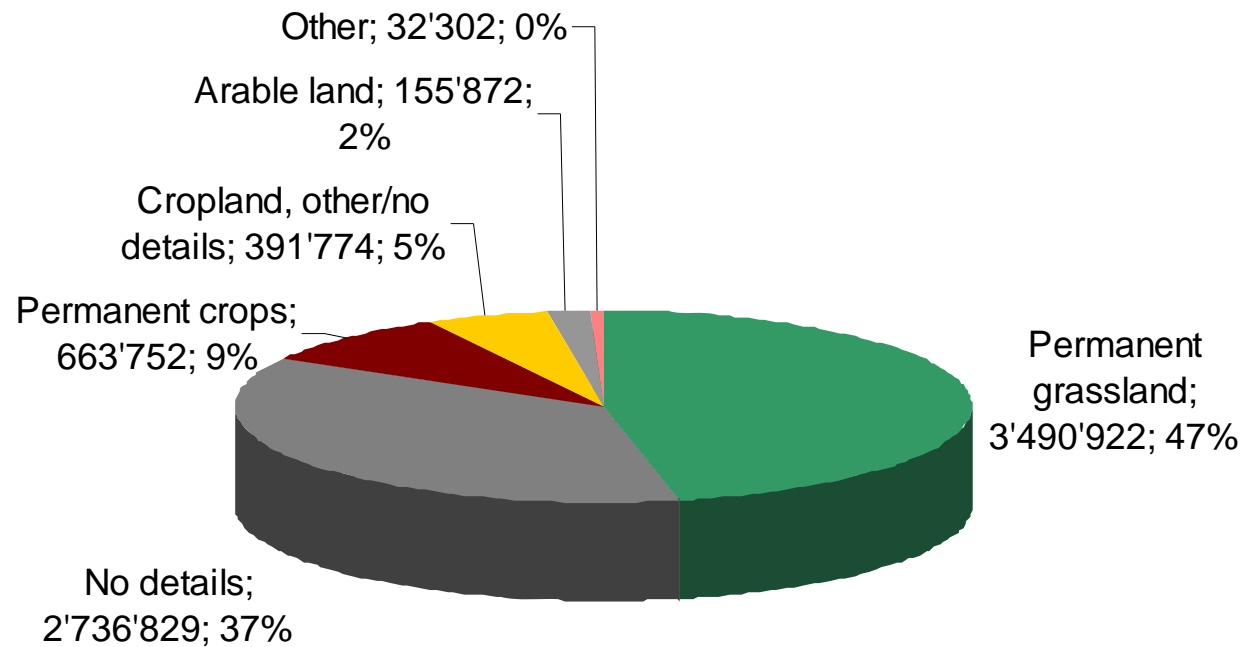


# Latin America: Growth of the organically managed land area 200-2007, the leading countries 2007



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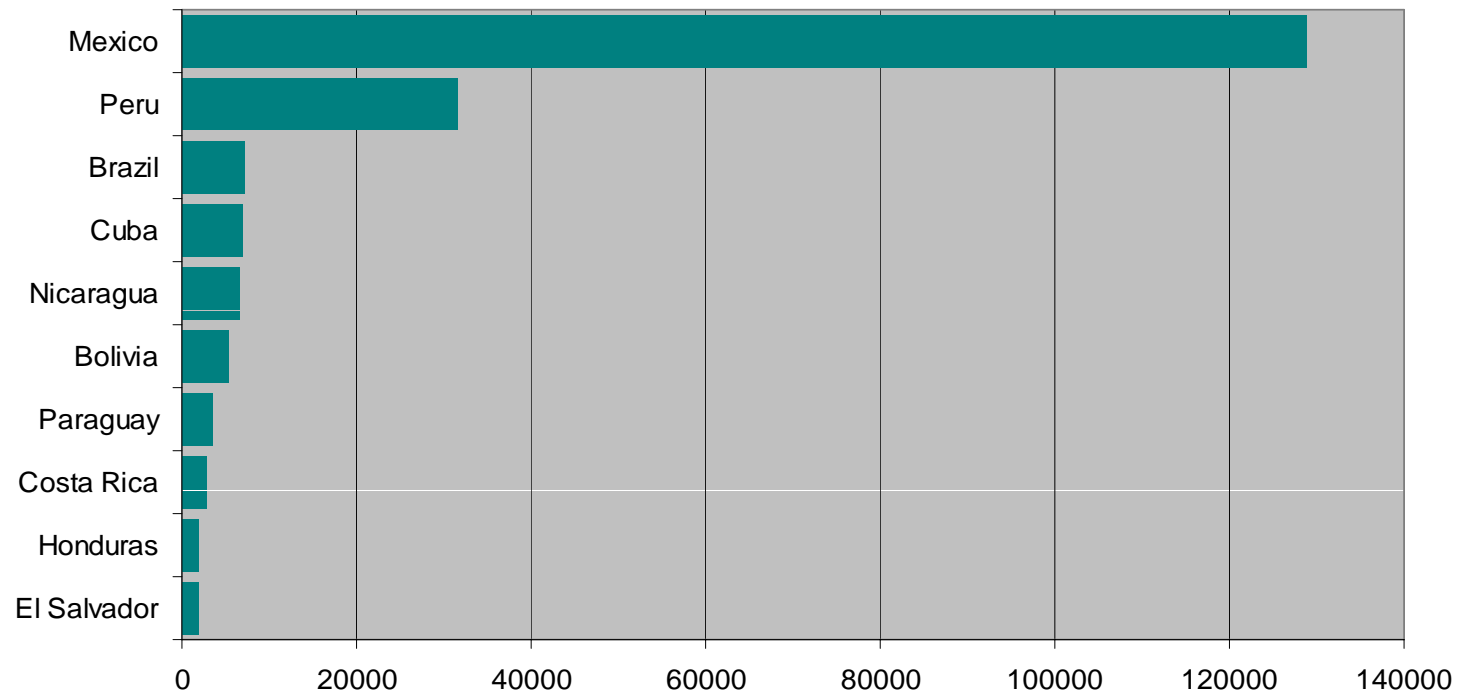
# Main land use of organically managed land in Latin America



Main organically land use in Latin America

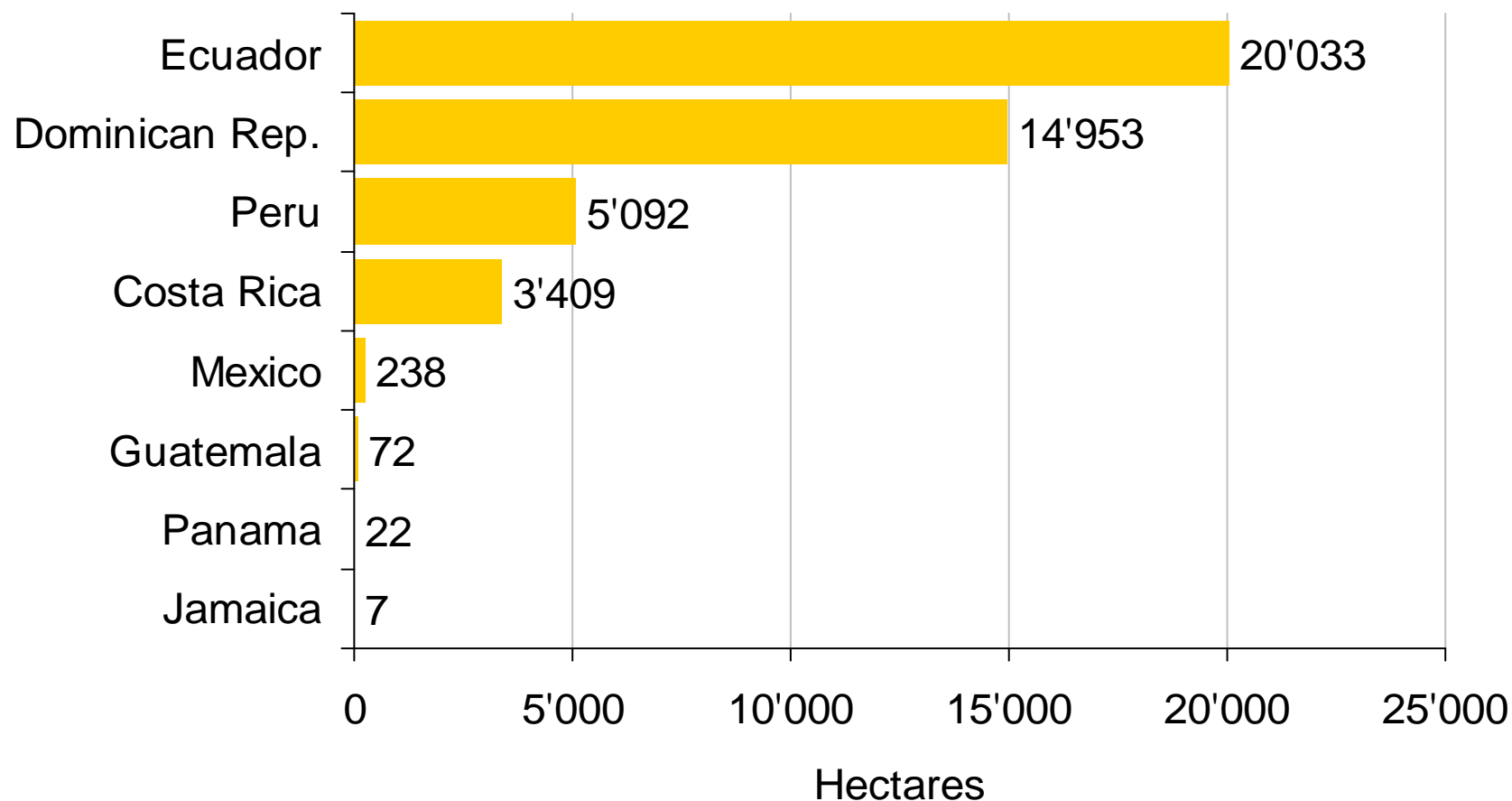


# The ten countries of Latin America with the largest numbers of producers



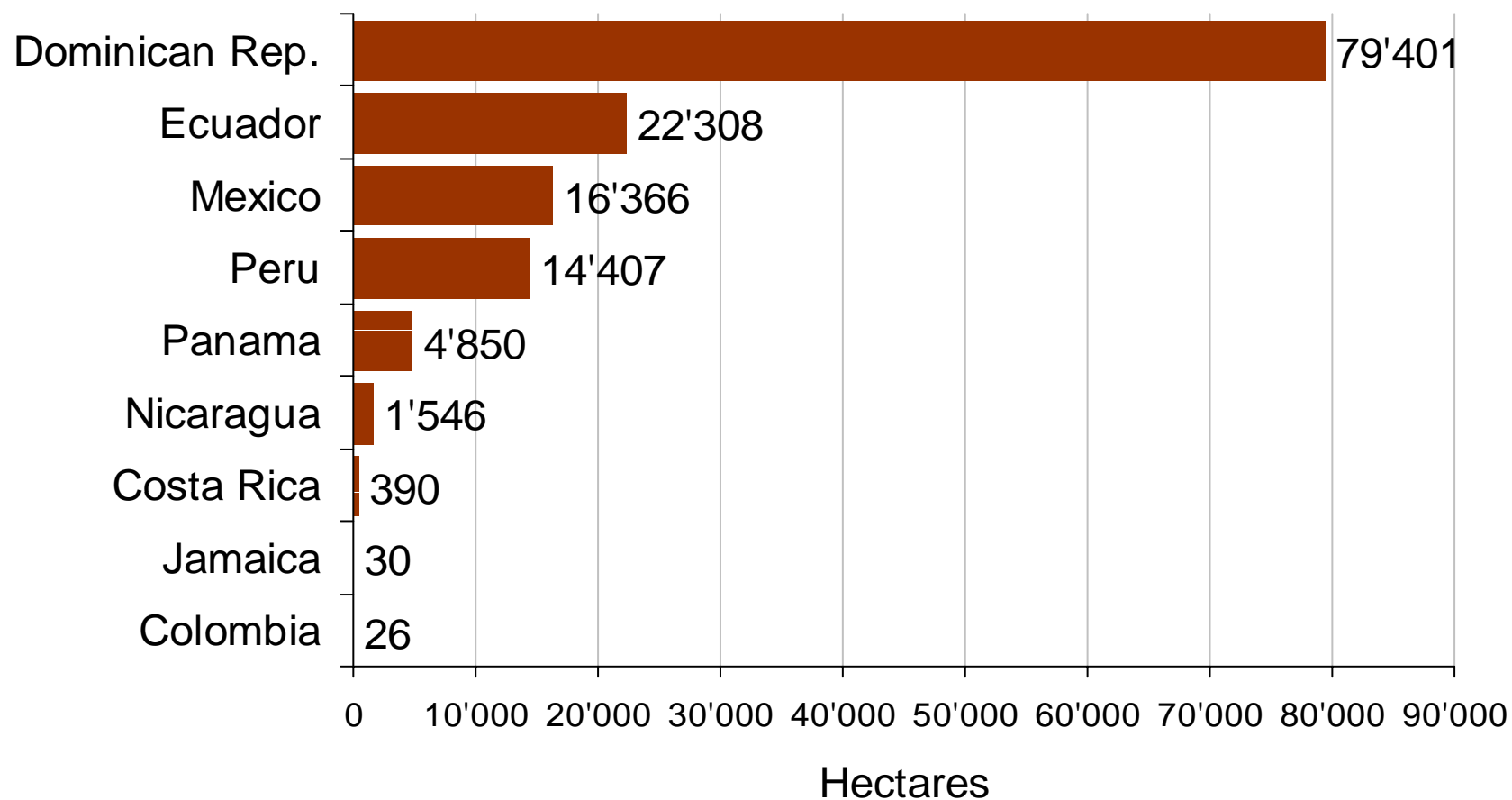
Source: FiBL 2009

# Latin America: Organic banana area (includes in-conversion)

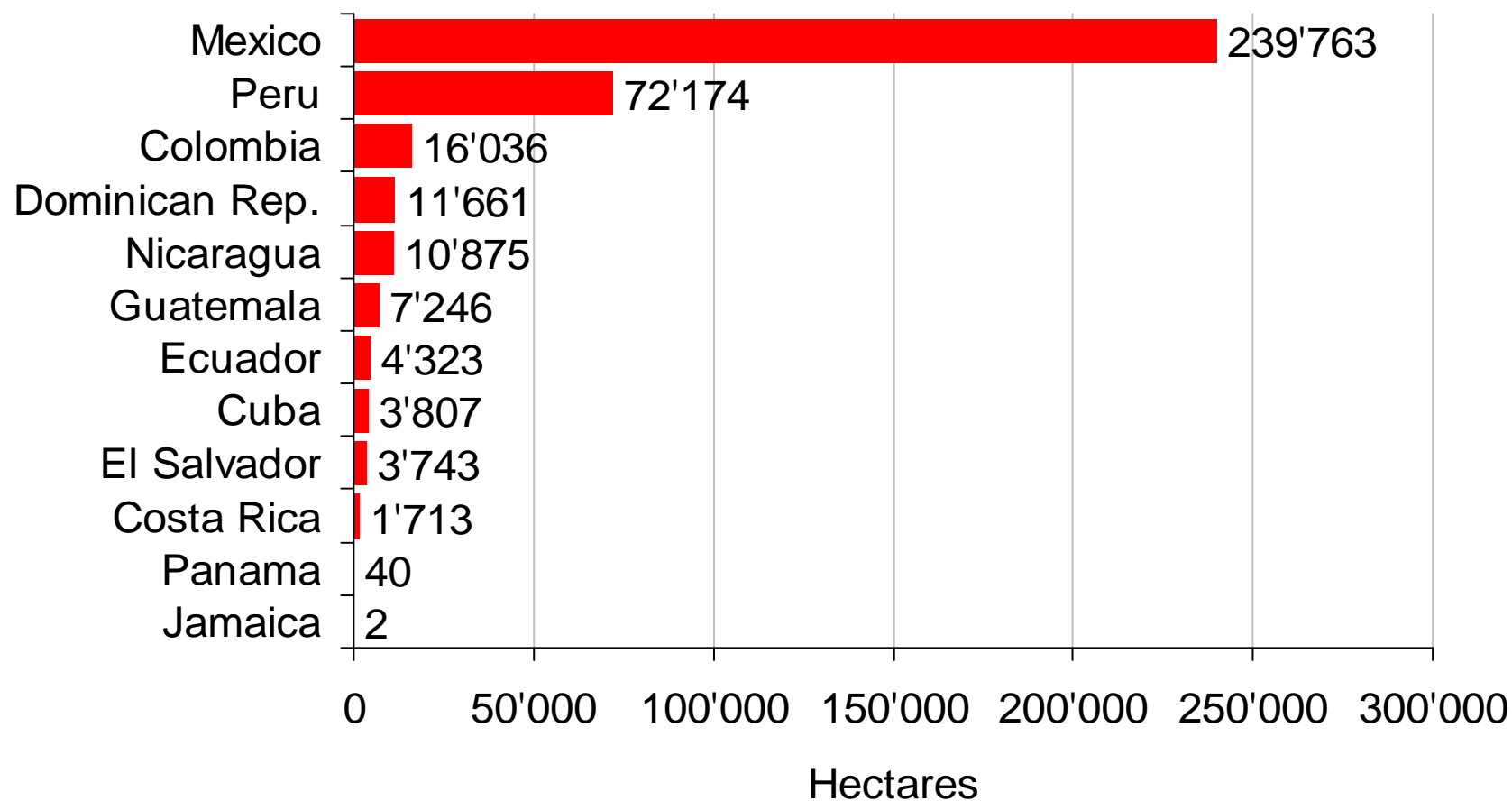


Most organic production from Latin America still for the export (> 90%)

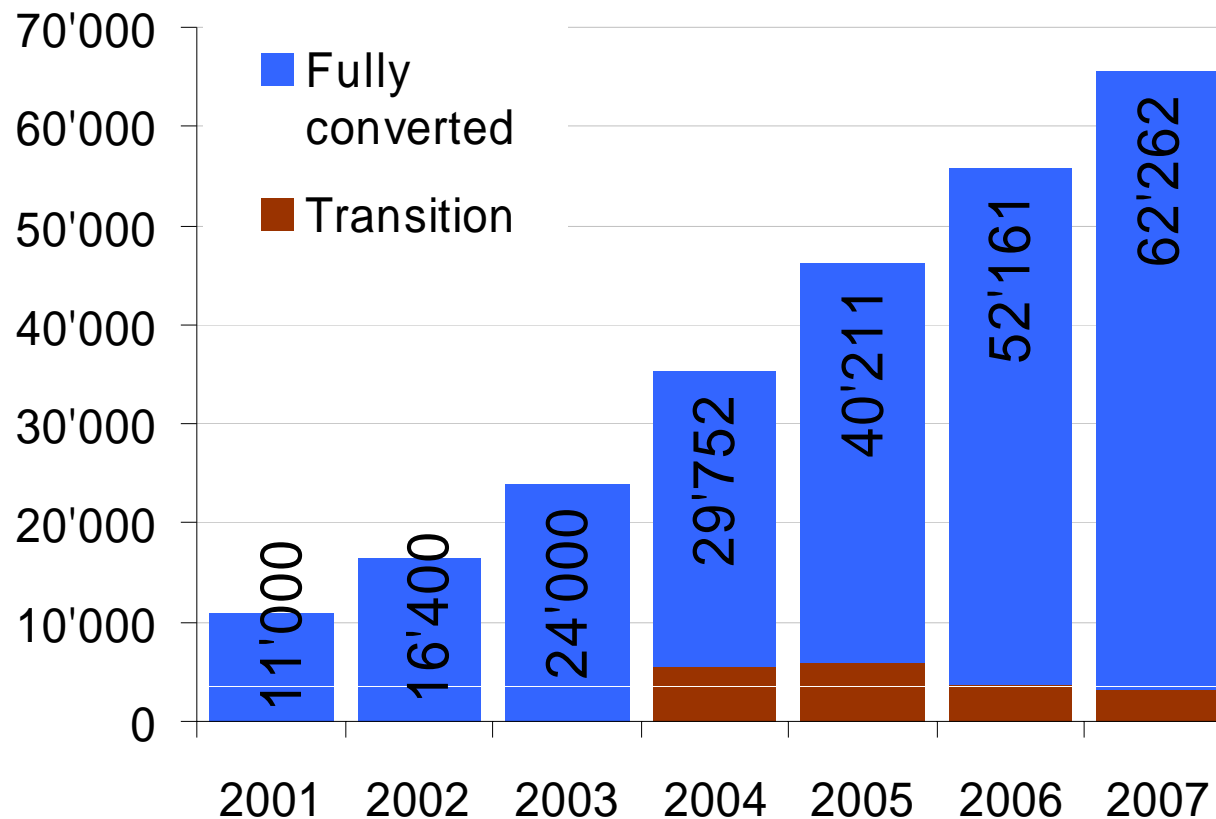
# Latin America: Organic cocoa area (includes in-conversion)



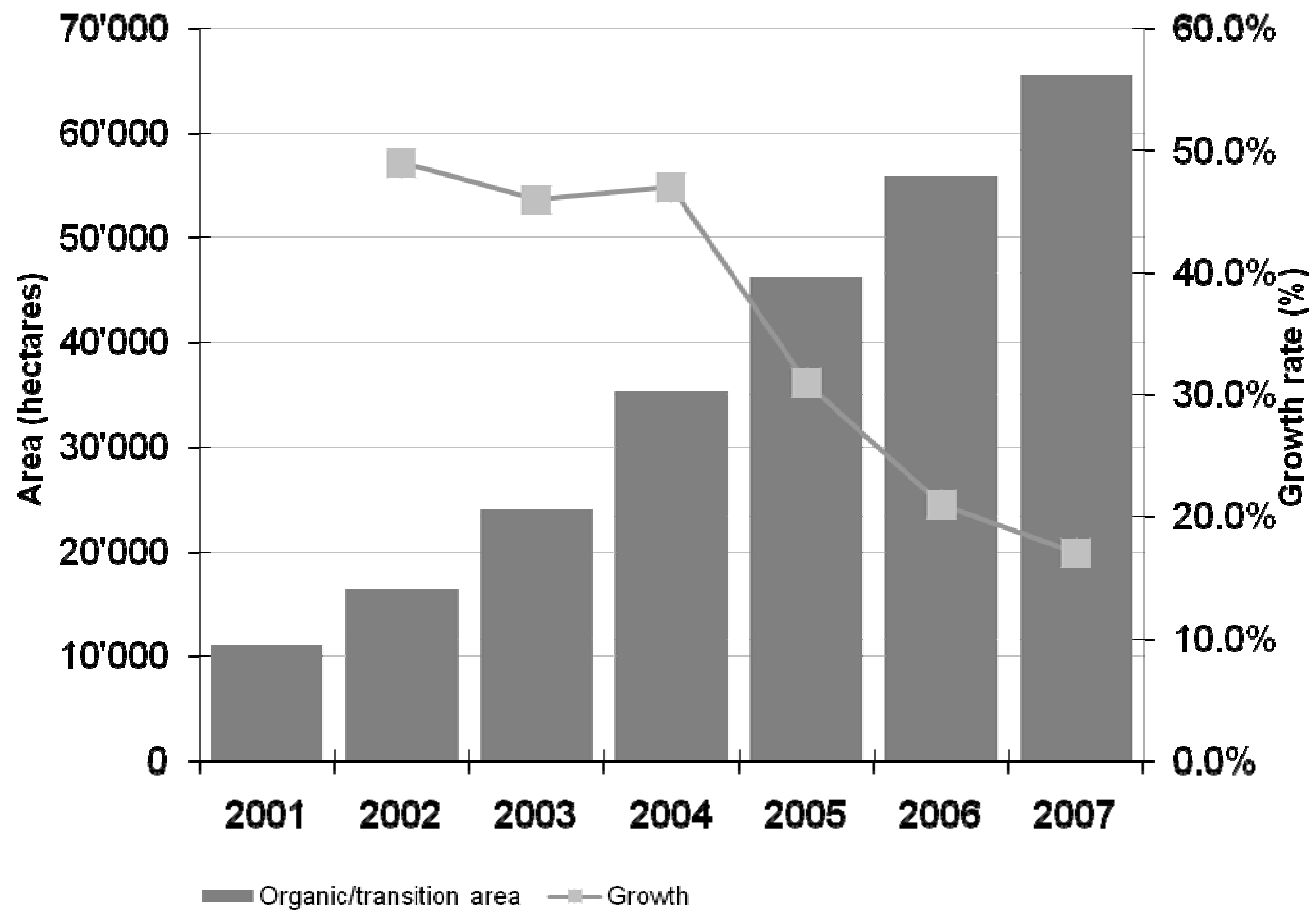
# Latin America: Organic coffee area (including in-converion land) 2008



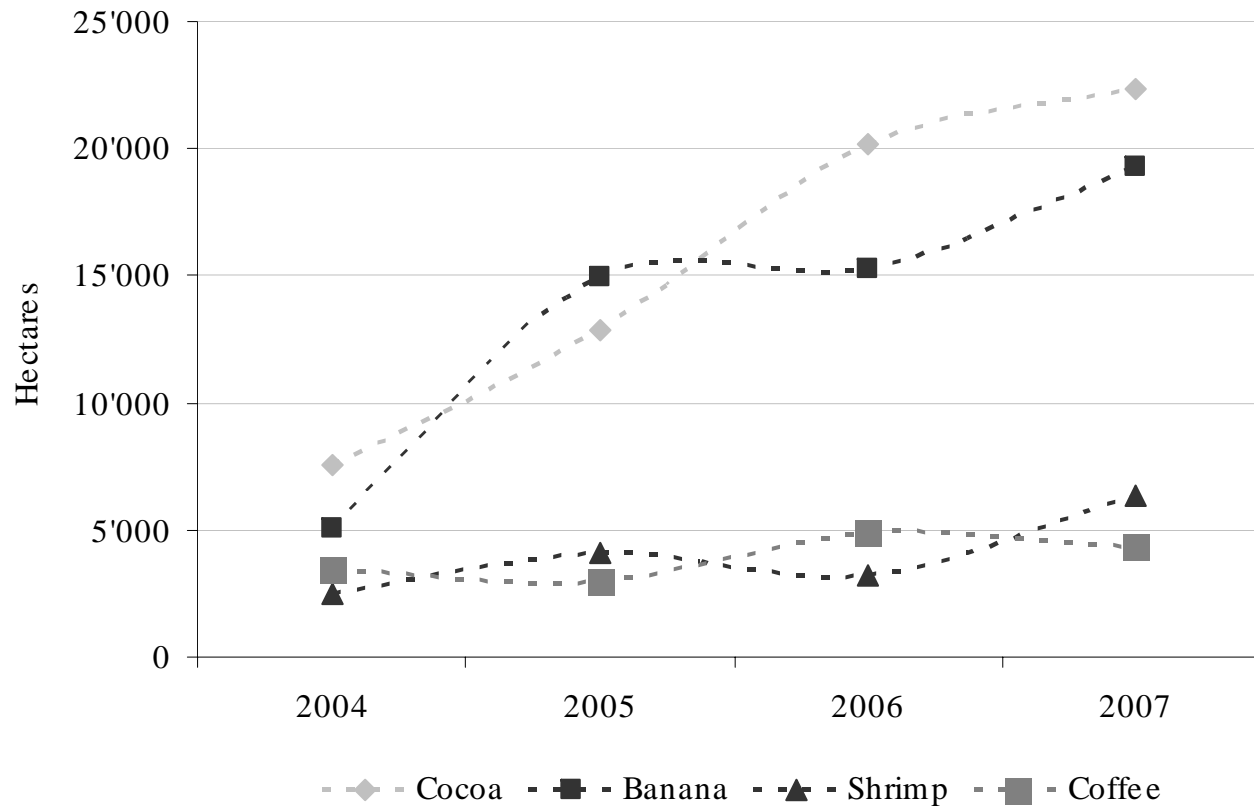
# Ecuador: Development of the organically managed land 2001-2007



# Ecuador: Development of the area under organic/transition production 2001-2007



# Ecuador: Area under organic production by main products



# Organic Market in Latin-American

- Main distribution channels:
  - Local markets (social)
  - Basquet market (social)
  - Farmers market (social)
  - Specialized stores (rich)
  - Supermarkets (rich)





# Organic Market in Latin-American



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## Conclusions

- Latin America still very dynamic in developing the organic production in their countries.
- Many small farmers are benefited by producing and selling organic products.
- Organic production have showed some reduction because there are competition with other labels as rainforest, crop failures due to climate change, pest and diseases, and low prices).

## Conclusions

- The Latin America organic market still focusing to the export.
- However, new organic participative guarantee systems are opening alternatives to develop the local organic markets from small farmers for low income consumers.